



“BE THE BALL” WHAT NEXT AFTER COP26?

December 2, 2021

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Before, during, and after COP26, I could not stop thinking about the final scene in the movie *Caddyshack*. In the film, young Danny Noonan vies to win a golf match to fund his college tuition. His winning putt teeters on the edge of the 18th hole when suddenly the golf course explodes. Bedlam ensues, with people running in all directions. But caddy manager Lou Loomis keeps a steady eye on the ball. As the tremors build, the ball wiggles and drops into the hole. Victory!

COP26 had a similar dynamic. Climate chaos drove unprecedented calls for action by young people and communities harmed by climate change. The private sector showed up in force with pledges to decarbonize. I tried to keep my eye on the ball. Would there be enough pressure to force the world's governments to “ratchet up” their commitments to prevent catastrophic climate change?

In Glasgow, sadly, life did not imitate art.

Governments did make new commitments, including pledges to cut methane emissions and end deforestation, but the net result will not be enough to limit climate change to the needed goal of 1.5 degrees. And questions remain about governments' ability to deliver on the commitments they made.

Why this failure of political will in the face of unprecedented global pressure?

Call it the “plus one” problem. The strength of a government's commitment in international negotiations depends on its ability to enact policies back home to cut emissions, most importantly to switch to non-fossil energy. As any politico will remind you, enacting policy in a democracy requires 50 percent of the votes in the legislature “plus one”—even more when a supermajority is required, as in the United States Senate.

According to the International Energy Agency, all but two of the G20 countries responsible for 80 percent of global emissions rely on coal, oil, and natural gas for over 70 percent of their energy (France has nuclear power and Brazil has bioenergy). Switching to non-fossil energy at the scale required will hurt states and provinces that produce the coal, oil, and gas, at least in the near term. The legislators who represent those jurisdictions will be skeptical at best.

In the United States, the Biden administration and Democratic leaders in Congress are trying to pass legislation to implement the U.S. pledge to cut emissions 50 percent by 2030. Using budget legislation, they need only 51 votes in the Senate, which they can reach with only Democrats. The “plus one” is West Virginia Democratic Senator Joe Manchin, who rejected the administration's preferred approach, a clean energy standard for electric utilities.

Why? Mining, oil, and gas made up 17 percent of West Virginia's economic output in 2019—a major source of jobs, livelihoods, and funding for schools, hospitals, roads, police, and other services for Senator Manchin's constituents. West Virginia is not alone. One in five U.S. states depend on mining, oil, and gas for 5 percent or more of their economic output, some as much as 20-30 percent, based on data from the Commerce Department's Bureau of Economic Analysis.

At COP26, in the most consequential mulligan of all time, governments agreed to revisit their commitments a year from now at COP27. With the political situation in G20 capitals dominated by the ongoing pandemic and its economic impact, deeper pledges are unlikely, especially from China, India, Indonesia, Australia, Russia, and South Africa who with the U.S. are the world's leading coal producers.

I do not elaborate this point to excuse inaction. I have dedicated my 30-year professional career to climate action, and I am as angry as anyone that we have allowed climate change to become the deadly threat that we predicted it would be decades ago. But I think any progress going forward demands brutal honesty, and the truth is that the move away from fossil fuels will not be immediate. Political reality, as much as technical and economic feasibility, means that the global energy transition will take decades. Yet science tells us we must act urgently in this decade to cut emissions at least 50 percent to avoid catastrophe.

What do we do now? I see four immediate priorities:

First, the private sector must implement its **decarbonization commitments**, even where policy signals are not sufficient. While voluntary action is not enough to solve the problem, it is an immediate source of incentives for emissions reductions throughout the global economy. The growing demand from investors and financial regulators for climate action and disclosure may become the most consequential driver of emissions reductions in the near term. The good thing is that many companies see the Race to Zero as a business opportunity.

Second, companies and governments need to collaborate on **carbon removal**. The global economy is unlikely to decarbonize fast enough to meet the 1.5-degree target. Carbon must be removed from the atmosphere. Natural climate solutions such as regenerative agriculture and habitat restoration are available immediately at scale and provide economic benefits to local communities while they sequester carbon. Human engineered technologies for carbon capture, utilization, and storage will be needed to decarbonize the fossil energy production that we cannot eliminate.

Third, companies and governments need to invest in **resilience** with the same urgency as decarbonization. Climate advocates once considered adaptation a distraction from mitigation. We no longer have that luxury. Communities are suffering climate-induced floods, storms, droughts, heatwaves, and pandemics today, and it only gets worse from here. Infrastructure and public services need new thinking and investment for climate resilience. This cannot come at the expense of decarbonization, as more emissions today means more expensive adaptation in the future.

Fourth, companies need to help build **political constituencies** to deliver the "plus one" votes for climate policy, especially in districts that produce fossil energy and agriculture, which tend to view climate action as a threat to their livelihoods. Investments in clean energy, carbon capture, natural climate solutions, resilience, and new employment for energy workers can address these concerns by showing that climate action delivers economic benefits.

COP26 did not put us on track to a safe climate. But the forces it unleashed among young activists demanding a better future, communities facing climate chaos, and business leaders banking on the transition are unstoppable. Which reminds me of another scene from *Caddyshack*. Danny asks the club's top player for tips, and Ty Webb replies, "There's a force in the universe that makes things happen. All you have to do is get in touch with it...and *be the ball*."

It is time for all of us to be the ball.

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